AMENDMENTS

In the Claims

1.   (Currently Amended)   A method for generating forecast information corresponding to an organization, comprising:

creating a forecast series comprising a set of parameters that define attributes of forecasts that are based thereon;

identifying opportunity data and revenue data corresponding to members of the organization, wherein the members of the organization are associated with positions in a hierarchy structure of the organization;

associating revenue data with identified opportunity data to create at least one revenue schedule containing a plurality of entries;

providing a plurality of visual adjustment patterns displaying a corresponding plurality of adjustment values, wherein selection of a visual adjustment pattern by a member of the organization results in an automatic application of the corresponding adjustment value to a member-selected entry in a revenue schedule in a manner depicted by a shape of the selected visual adjustment pattern;

calculating forecast data associated with the forecast series and corresponding to the members of the organization using the identified opportunity data and said at least one revenue schedule corresponding to members of the organization;

defining visibility rules that specify the forecast data corresponding to the members of the organization that are visible to a first member of the organization having at least one subordinate member, wherein the visibility rules are defined according to the position of the first member in the hierarchy; and

generating a forecast for the first member of the organization using the set of parameters in the forecast series and based on a forecast submitted by said at least one subordinate member, wherein the data used for said generating the forecast for the first member is limited to forecast data corresponding to the members of the organization according to the visibility rules and wherein a

<u>forecast for said at least one subordinate member is automatically generated when said at least one subordinate member fails to submit a forecast prior to generation of the forecast for the first member.</u> [[;]]

~~associating a state with the forecast, wherein the state comprises one of~~

~~a created forecast state,~~

~~an included forecast state, if the forecast is included in data of a forecast of another,~~

~~a submitted forecast state, if the forecast is submitted by the first member of the organization, and~~

~~an included-as-submitted forecast state, if the forecast is submitted by the first member of the organization and included in data of a forecast of another;~~

~~modifying states associated with each forecast data corresponding to members of the organization to one of~~

~~the included forecast state, if the forecast data does not currently have the submitted forecast state, and~~

~~the included as submitted forecast state, if the forecast data does currently have the submitted forecast state; and~~

~~enabling the first member to modify the forecast data corresponding to the members of the organization, if the forecast data does not have an associated included-as-submitted forecast state.~~

2.   (Original)   The method of claim 1, wherein the hierarchy structure comprises a plurality of management levels; further comprising:

defining visibility rules that specify the forecast data that are visible to each management level of the organization; and

enabling a forecast to be generated for any management level of the organization, wherein each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules.

3. (Previously Presented) The method of claim 1, wherein the first member of the organization is a manager and wherein the visibility rules include a maximum hierarchy depth search value n defining a search scope such that the forecast for the manager is generated from the manager's own forecast data and from forecast data corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy that is <= n levels below a management level occupied by the manager.

4. **(Canceled)**

5. **(Currently Amended)** The method of claim [[4]] **1**, wherein the forecast series comprises parameters that define the visibility rules for forecasts that are based on the forecast series.

6. **(Currently Amended)** The method of claim [[1]] **34**, further comprising:
enabling the first member to submit the forecast to a superior in the hierarchy structure,
wherein said submitting **by the first member** comprises associating the submitted forecast state with the forecast **to be submitted to the superior**; and
preventing the first member from modifying the forecast after it has been submitted.

7. **(Currently Amended)** The method of claim [[6]] **34**, further comprising:
enabling the superior or a system administrator to unsubmit ~~the~~ **a** forecast such that the member who submitted that forecast is enabled to modify the forecast, wherein said unsubmitting comprises associating one of the created forecast state and the included forecast state with the forecast.

8. (Original) The method of claim 1, further comprising presenting forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

9 - 13. (Canceled)

14.   (Currently Amended)   A method for generating and presenting forecast information, comprising:

creating a forecast series comprising a set of parameters that define attributes of forecasts that are based thereon;

identifying opportunity data ~~and revenue data~~ corresponding to the members of an organization, wherein the members of the organization are associated with positions in a hierarchy structure of the organization;

associating revenue data with identified opportunity data to create at least one revenue schedule containing a plurality of entries;

providing a plurality of visual adjustment patterns displaying a corresponding plurality of adjustment values, wherein selection of a visual adjustment pattern by a member of the organization results in an automatic application of the corresponding adjustment value to a member-selected entry in a revenue schedule in a manner depicted by a shape of the selected visual adjustment pattern;

calculating forecast data **associated with the forecast series and** corresponding to the members of the organization using the identified **opportunity** data **and said at least one revenue schedule** ~~corresponding to members of the organization~~;

determining an identity of a current forecast participant who is a member of the organization;

identifying subordinate members of the organization who are subordinate to the current forecast participant based on the hierarchy structure;

presenting forecast data to the current forecast participant, wherein the forecast data specific to each of the one or more subordinate members is viewable by the current forecast participant; **and**

when the current forecast participant is a manager, generating a forecast for the current forecast participant using the set of parameters in the forecast series and based on forecasts that are submitted by one or more selected subordinate members, wherein a forecast for any selected subordinate member is automatically generated when said selected subordinate member fails to submit a forecast prior to generation of the forecast for the manager,

and wherein a forecast for the manager is generated based on a combination

of forecasts submitted by said selected subordinate members and

automatically generated forecasts.

~~associating a state with the forecast data specific to each of the one or more~~

~~subordinate members, wherein the state comprises one of~~

~~a created forecast state,~~

~~an included forecast state, if the forecast is included in data of a forecast of~~

~~another,~~

~~a submitted forecast state, if the forecast is submitted by the member of the~~

~~organization associated with the forecast, and~~

~~an included-as-submitted forecast state, if the forecast is submitted by the~~

~~member of the organization associated with the forecast and included~~

~~in data of a forecast of another; and~~

~~enabling the current forecast participant to modify the forecast data based on the~~

~~revenue data and opportunity data of the one or more subordinate members,~~

~~if the forecast data does not have an associated submitted state or included-~~

~~as-submitted state.~~

15.   (Canceled)

16.   **(Currently Amended)**   The method of claim ~~15~~ 14, wherein the manager
occupies at least a second level of management in the organization's hierarchy and automatically
calculating forecasts for said one or more selected subordinate members ~~and~~ who have not
submitted their forecast is applied in a recursive manner from lower levels to higher levels in the
organization's hierarchy.

17.   **(Currently Amended)**   A machine-readable media on which a plurality of
machine-executable instructions are stored that when executed by a machine generates forecast
information corresponding to an organization by performing the operations of:

creating a forecast series comprising a set of parameters that define attributes of

forecasts that are based thereon;

Application No.: 10/007,730

identifying hierarchy data, defining a hierarchy structure of the organization to be entered into the machine, and comprising hierarchical positions of members of the organization;

identifying opportunity data ~~and revenue data~~ corresponding to the members of the organization to be input into the machine;

associating revenue data with identified opportunity data to create at least one revenue schedule containing a plurality of entries;

providing a plurality of visual adjustment patterns displaying a corresponding plurality of adjustment values, wherein selection of a visual adjustment pattern by a member of the organization results in an automatic application of the corresponding adjustment value to a member-selected entry in a revenue schedule in a manner depicted by a shape of the selected visual adjustment pattern;

calculating forecast data **associated with the forecast series and** corresponding to the members of the organization using the identified **opportunity** data **and said at least one revenue schedule** ~~corresponding to members of the organization~~;

defining visibility rules that specify the forecast data corresponding to the members of the organization that are visible to a first member of the organization **having at least one subordinate member**, wherein the visibility rules are defined according to the hierarchy data; **and**

generating a forecast for the first member of the organization **using the set of parameters in the forecast series and based on a forecast submitted by said at least one subordinate member**, wherein the data used for said generating the forecast _for the first member_ is limited to forecast data corresponding to members of the organization according to the visibility rules **and wherein a forecast for said at least one subordinate member is automatically generated when said at least one subordinate member fails to submit a forecast prior to generation of the forecast for the first member. [[;]]**

~~associating a state with the forecast, wherein the state comprises one of~~
~~a created forecast state,~~

~~an included forecast state, if the forecast is included in data of a forecast of another,~~

~~a submitted forecast state, if the forecast is submitted by the member of the organization associated with the forecast, and~~

~~an included-as-submitted forecast state, if the forecast is submitted by the member of the organization associated with the forecast and included in data of a forecast of another;~~

~~modifying states associated with each forecast data corresponding to members of the organization to one of~~

~~the included forecast state, if the forecast data does not currently have the submitted forecast state, and~~

~~the included-as-submitted forecast state, if the forecast data does currently have the submitted forecast state; and~~

~~enabling the first member to modify the forecast data corresponding to the members of the organization, if the forecast data does not have an associated included-as-submitted forecast state.~~

18.   (Currently Amended)   The machine-readable media of claim 17, wherein the hierarchy structure comprises a plurality of management levels and wherein execution of the machine instructions further performs the operations of:

enabling visibility rules that specify the forecast data that are visible to each management level of the organization to be entered into ~~the~~ a computer; and

enabling a forecast to be generated for any management level of the organization, wherein each forecast that is generated is based on forecast data that are visible to the management level for which that forecast corresponds as specified by the visibility rules.

19.   (Previously Presented)   The machine-readable media of claim 17, wherein the first member of the organization is a manager and wherein the visibility rules include a maximum hierarchy depth search value n defining a search scope such that the forecast for the manager is generated from the manager's own forecast data and from forecast data

corresponding to members of the organization who are defined to be both subordinate to the manager and occupy a management level in the hierarchy that is <= n levels below a management level occupied by the manager.

20. **(Canceled)**

21. **(Currently Amended)** The machine-readable media of claim ~~20~~ 17, wherein the forecast series comprises parameters that define the visibility rules for forecasts that are based on the forecast series.

22. **(Currently Amended)** The machine-readable media of claim ~~17~~ **36**, wherein execution of the machine instructions further performs the operations of:

> enabling the first member to submit the forecast to a superior in the hierarchy, wherein
>> said submitting **by the first member** comprises associating the submitted forecast
>>> state with the forecast **to be submitted to the superior**; and
> preventing the first member from modifying the forecast after it has been submitted.

23. **(Currrently Amended)** The machine-readable media of claim ~~22~~ **36**, wherein execution of the machine instructions further perform the operation of enabling the superior or a system administrator to unsubmit ~~the~~ **a** forecast such that the member who submitted that forecast is enabled to modify the forecast, wherein said unsubmitting comprises associating one of the created forecast state and the included forecast state with the forecast.

24. **(Original)** The machine-readable media of claim 17, wherein execution of the machine instructions further perform the operation of presenting forecast data in a graphical format that enables a member to compare forecast data corresponding to related forecasts over time that are specified to be visible to that member.

25 – 29. **(Canceled)**

30.   (Currently Amended)   A machine-readable media on which a plurality of machine-executable instructions are stored that when executed by a machine generates and presents forecast information corresponding to an organization by performing the operations of:

   creating a forecast series comprising a set of parameters that define attributes of forecasts that are based thereon;

   identifying hierarchy data defining members of an organization and a hierarchical position of each member;

   identifying opportunity data ~~and revenue data~~ corresponding to the members of the organization;

   associating revenue data with identified opportunity data to create at least one revenue schedule containing a plurality of entries;

   providing a plurality of visual adjustment patterns displaying a corresponding plurality of adjustment values, wherein selection of a visual adjustment pattern by a member of the organization results in an automatic application of the corresponding adjustment value to a member-selected entry in a revenue schedule in a manner depicted by a shape of the selected visual adjustment pattern;

   calculating forecast data **associated with the forecast series and** corresponding to the members of the organization using the identified **opportunity** data **and said at least one revenue schedule** ~~corresponding to members of the organization~~;

   determining an identity of a current forecast participant who is a member of the organization;

   identifying subordinate members of the organization who are subordinate to the current forecast participant based on the hierarchy data;

   presenting forecast data to the current forecast participant, wherein the forecast data specific to each of the one or more subordinate members is viewable by the current forecast participant; **and**

   when the current forecast participant is a manager, generating a forecast for the current forecast participant using the set of parameters in the forecast series and based on forecasts that are submitted by one or more selected subordinate members, wherein a forecast for any selected subordinate

member is automatically generated when said selected subordinate member
fails to submit a forecast prior to generation of the forecast for the manager,
and wherein a forecast for the manager is generated based on a combination
of forecasts submitted by said selected subordinate members and
automatically generated forecasts.

~~associating a state with the forecast data specific to each of the one or more~~
~~subordinate members, wherein the state comprises one of~~
~~a created forecast state,~~
~~an included forecast state, if the forecast is included in data of a forecast of~~
~~another,~~
~~a submitted forecast state, if the forecast is submitted by the member of the~~
~~organization associated with the forecast, and~~
~~an included-as-submitted forecast state, if the forecast is submitted by the~~
~~member of the organization associated with the forecast and included~~
~~in data of a forecast of another; and~~
~~enabling the current forecast participant to modify the forecast data based on the~~
~~revenue data or opportunity data of the one or more subordinate members, if~~
~~the forecast data does not have an associated submitted state or included as~~
~~submitted state.~~

31.   (Canceled)

32.   (Currently Amended)   The machine-readable media of claim ~~31~~ <u>30</u>, wherein
the manager occupies at least a second level of management in the organization's hierarchy and
automatically calculating forecasts for said one or more selected subordinate members ~~and~~ <u>who</u>
have not submitted their forecast is applied in a recursive manner from lower levels to higher
levels in the organization's hierarchy.

33.   (Canceled)

Please add the following new claims 34 through 37:

34. (New) The method of claim 1, further comprising:

associating a state with the forecast for the first member, wherein the state comprises one

of the following:

a created forecast state,

an included forecast state, if the forecast is included in data of a forecast of

another,

a submitted forecast state, if the forecast is submitted by the first member of the

organization, and

an included-as-submitted forecast state, if the forecast is submitted by the first

member of the organization and included in data of a forecast of another;

modifying states associated with each forecast data corresponding to members of the

organization to one of

the included forecast state, if the forecast data does not currently have the

submitted forecast state, and

the included-as-submitted forecast state, if the forecast data does currently have

the submitted forecast state; and

enabling the first member to modify the forecast data corresponding to the members of

the organization, if the forecast data does not have an associated included-as-

submitted forecast state.

35. (New) The method of claim 14, further comprising:

associating a state with the forecast data specific to each of the one or more subordinate

members, wherein the state comprises one of

a created forecast state,

an included forecast state, if the forecast is included in data of a forecast of

another,

a submitted forecast state, if the forecast is submitted by the member of the

organization associated with the forecast, and

an included-as-submitted forecast state, if the forecast is submitted by the member
of the organization associated with the forecast and included in data of a
forecast of another; and

enabling the current forecast participant to modify the forecast data based on the revenue
data and opportunity data of the one or more subordinate members, if the forecast
data does not have an associated submitted state or included-as-submitted state.

36. (New) The machine-readable media of claim 17, wherein execution of the machine
instructions further performs the operations of:

associating a state with the forecast for the first member, wherein the state comprises one
of the following:

a created forecast state,

an included forecast state, if the forecast is included in data of a forecast of
another,

a submitted forecast state, if the forecast is submitted by the member of the
organization associated with the forecast, and

an included-as-submitted forecast state, if the forecast is submitted by the member
of the organization associated with the forecast and included in data of a
forecast of another;

modifying states associated with each forecast data corresponding to members of the
organization to one of

the included forecast state, if the forecast data does not currently have the
submitted forecast state, and

the included-as-submitted forecast state, if the forecast data does currently have
the submitted forecast state; and

enabling the first member to modify the forecast data corresponding to the members of
the organization, if the forecast data does not have an associated included-as-
submitted forecast state.

37. (New) The machine-readable media of claim 30, wherein execution of the machine
instructions further performs the operations of:

associating a state with the forecast data specific to each of the one or more subordinate

members, wherein the state comprises one of

a created forecast state,

an included forecast state, if the forecast is included in data of a forecast of

another,

a submitted forecast state, if the forecast is submitted by the member of the

organization associated with the forecast, and

an included-as-submitted forecast state, if the forecast is submitted by the member

of the organization associated with the forecast and included in data of a

forecast of another; and

enabling the current forecast participant to modify the forecast data based on the revenue

data or opportunity data of the one or more subordinate members, if the forecast

data does not have an associated submitted state or included as submitted state.